

What's New in WorkCenter CRM 5.0

vForms software is proud to announce the release of our WorkCenter 5.0 CRM for mortgage and financial professionals. The features and enhancements in this release are based on numerous requests and suggestions from users and beta testers across the country.

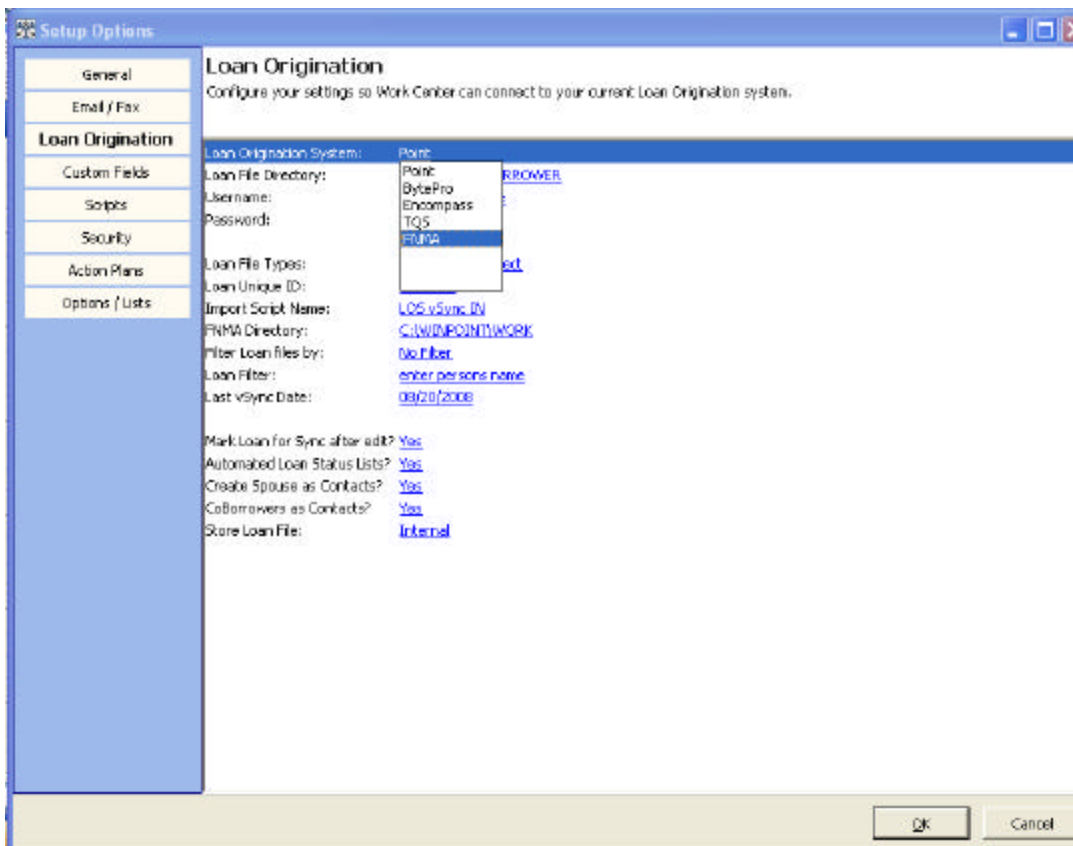
Here is a list of enhancements included in the release of WorkCenter CRM 5.0:

1. Direct data syncing into WorkCenter CRM from FNMA formatted files
2. Enhanced data importing wizard including better display features with the ability to save multiple templates
3. Calyx Point 6.2 integration
4. Contact Custom Fields have been increased from 25 to 50 fields
5. Loan Custom Fields have been increased from 25 to 50 fields
6. Contact Spouse First and Last Names have been added to the database
7. Database fields have been added to accommodate 4 children names and 4 children birthday fields
8. Database fields have been added to accommodate Borrower and Co-Borrower birthday fields
9. Enhanced Calyx Point vSync Script
10. Added a "Change Home Address to Property Address Script"
11. Added action plans and documents to accommodate all loan status steps
12. Added Jonathan Klein Contact List Manager Lists
13. Added Jonathan Klein and Sue Woodard sample marketing documents for review
14. Microsoft Vista Office 2007 (Outlook; Word; Excel) Operations
15. "WorkCenterPro" CRM is available in a monthly subscription basis in conjunction with OriginationPro.com (Newsletters created by Dave Hershman, OriginationPro)
16. A new WorkCenter 5.0 User Manual has been created in PDF format with bookmarks
17. Additional training aids and Webinars

Direct Synchronization with FNMA file formatted documents:

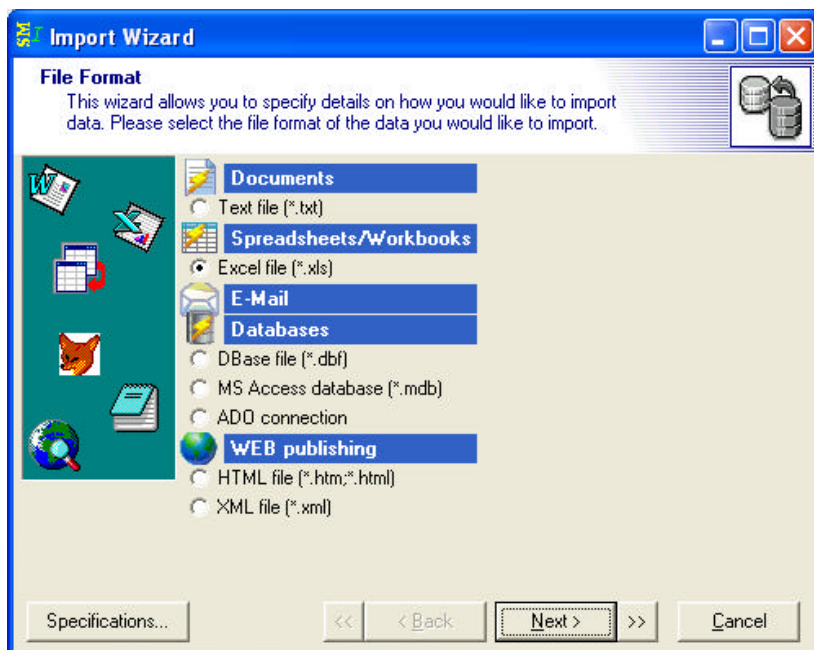
WorkCenter 5.0 will now allow you to sync into the database data contained in a FNMA file formatted document. As we all know, every LOS (Loan Origination Software) system will export and import FNMA files. All the WorkCenter user will need to do for this is to load all of their FNMA files into a selected directory on their computer. Once that has been accomplished, users will open WorkCenter, click on Tools, Setup Options and then the Loan Origination Tab and click into the box titled Loan Origination Systems. Users then select the FNMA from the drop down menu. To effectively use WorkCenter for other LOS users, this is a significant enhancement to increase proficiency.

Once the FNMA option has been selected, click into the Loan File Directory link and set this to the appropriate folder where you have loaded your FNMA files.



Enhanced Data Importing WorkCenter Wizard:

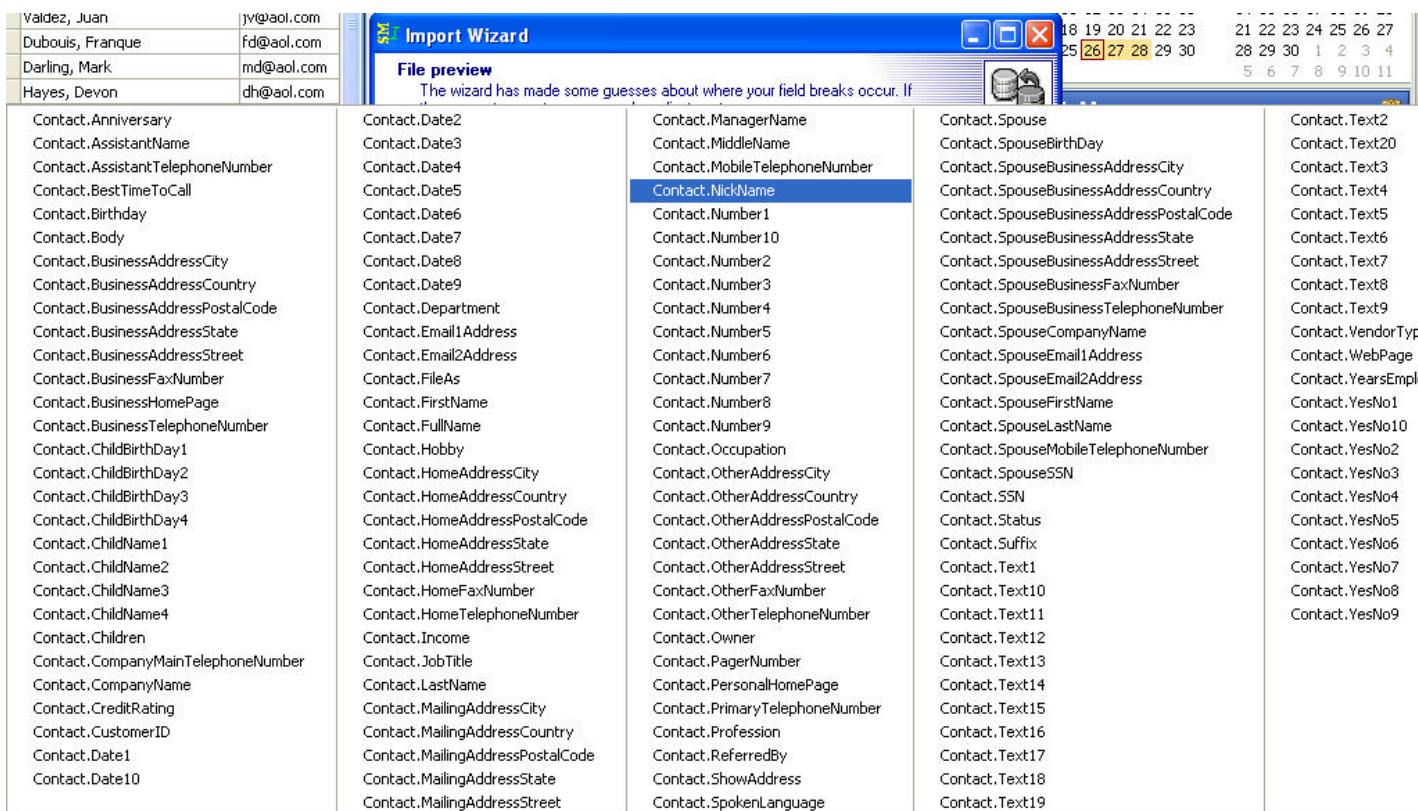
The 5.0 version of WorkCenter now has an advanced wizard display screen when importing external data into WorkCenter. When you select the option for “Spreadsheets/WorkBooks”, the wizard will allow you to load Excel from Office 97-2003 or 2007 file formats.



We have added further enhancements to the import wizard now allowing you to select three options with the drop down mapping after you have selected your appropriate data sheet for importing. These are “Journals”; “Contacts”; and “Loans” as shown below:



Once you have selected between the three options, you will now see all the fields for that category available for rapid selection in your mapping process (for this example, we have selected “Contact”):



Once the individual item has been selected, you will see a check next to that field to assist you in correctly mapping the data fields into WorkCenter.

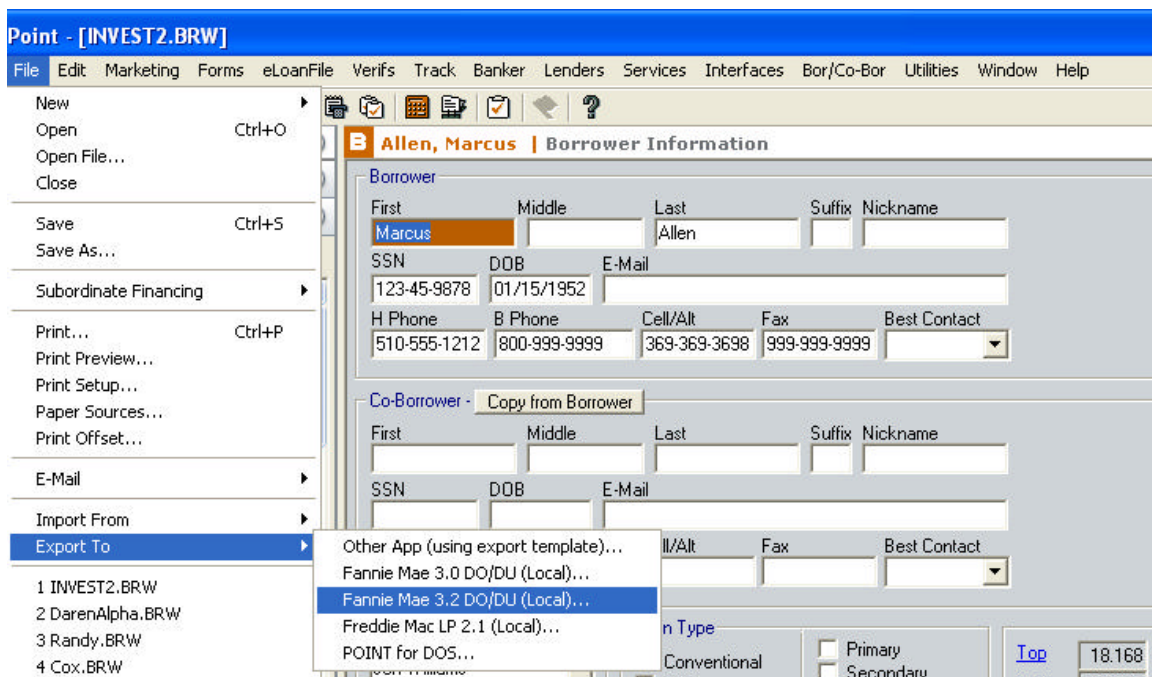
Calyx Point 6.0 – 6.2 and PDS integration now available:

WorkCenter 5.0 now will allow you to access the Calyx Point 6.2 versions. You can also set your WorkCenter Calyx Point data on automatic for syncing your PDS changed files into your database. This is accomplished with our direct synchronization with the Calyx Point PDS (Point Data Server) for those who have elected that service with Calyx Software.

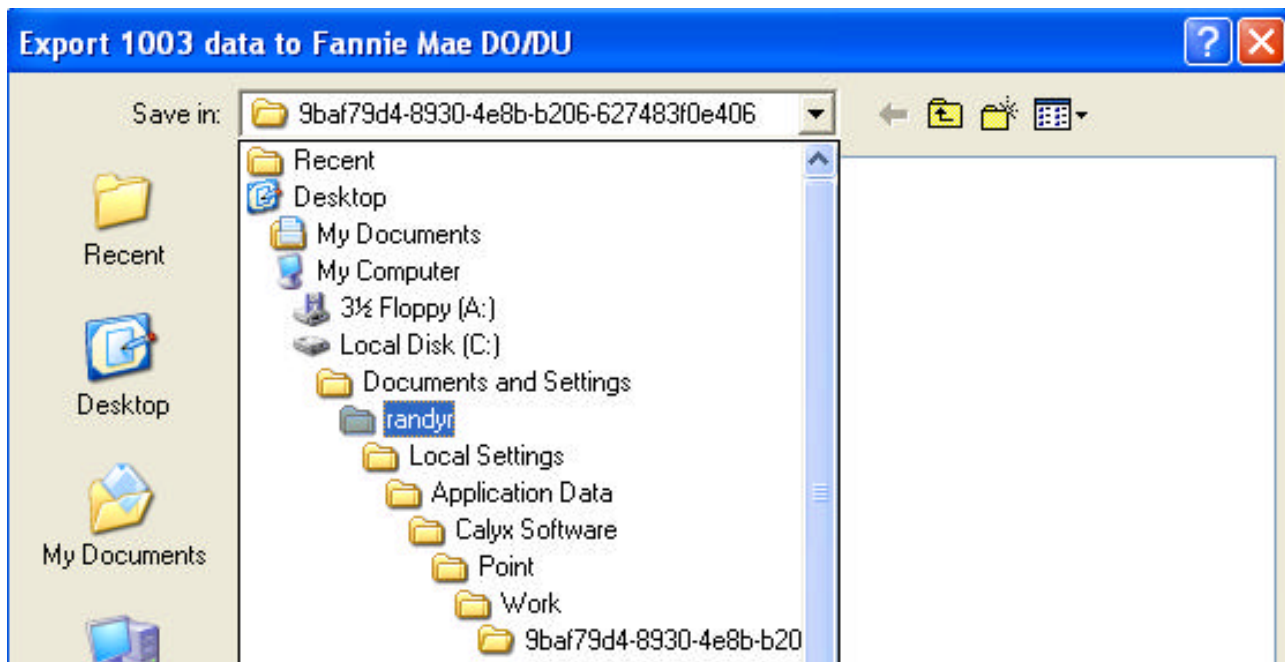
Programming your Calyx Point PDS Setup Options:

If you are using the Calyx Point PDS server in your operations, you will need to change the settings in your system setup program. Click on **TOOLS, SETUP OPTIONS** and then the **LOAN ORIGATION TAB:**

1. On standard 6.0 settings for the PDS from Calyx Point, set the Loan File Directory to this heading: **C:\Winpoint\Users\PDS Folders** (not the individual files)
2. Set the “Mark Loan For Sync after Edit” to “Auto”. Once that is set, anytime you modify a Calyx Point file in your Calyx Point Data Server, it will automatically sync into your WorkCenter CRM database.
3. On the standard 6.1 settings for the PDS server, you will need to locate where your technical department has directed your temporary point files to be loaded. The easiest way to find the appropriate file is to open your Calyx Point Software and then open a specific borrower or prospect file. Once the file is open, click “File”, “Export To” and then “Fannie Mae 3.2”.



You will now see a box appear showing you where the FNMA files are exported under the new versions. This computer tree is the same location and path where you will need to direct WorkCenter for syncing. Direct it to the PDS folders when you look at your computer once you have located the path. If you have problems locating your PDS folders, ask your in-house technical support for assistance or call us at vForms.



When you have located the appropriate PDS folder, open WorkCenter, Tools, Setup Options, Loan Origination Tab and then set that location as shown below. You will also need to set “Auto” for “Mark Loan for Sync after Edit”.

Setup Options

Loan Origination

Configure your settings so Work Center can connect to your current

General	Loan Origination System: Point
Email / Fax	Loan File Directory: C:\WINPOINT\PDS Folders
Loan Origination	Username: Enter login Name
Custom Fields	Password: *****
Scripts	Loan File Types: Borrower+Prospect
Security	Loan Unique ID: FileName
Action Plans	Import Script Name: LOS vSync IN
Options / Lists	FNMA Directory: C:\WINPOINT\WORK
	Filter Loan Files by: No Filter
	Loan Filter: enter persons name
	Last vSync Date: 03/26/2007
	Mark Loan for Sync after edit? Auto
	Automated Loan Status Lists? Yes
	Create Spouse as Contacts? Yes
	CoBorrowers as Contacts? Yes
	Store Loan File: Internal

Contact Custom Fields and Loan Custom Fields Increased:

Previous versions of WorkCenter had 25 contact custom fields and 25 loan custom fields in your database. These custom fields consisted of 10 Text, 5 Dates, 5 Numbers and 5 Yes/No fields for your option to rename and use as needed. When you review the custom fields you will now have twice the number in your database:

20 Text Fields

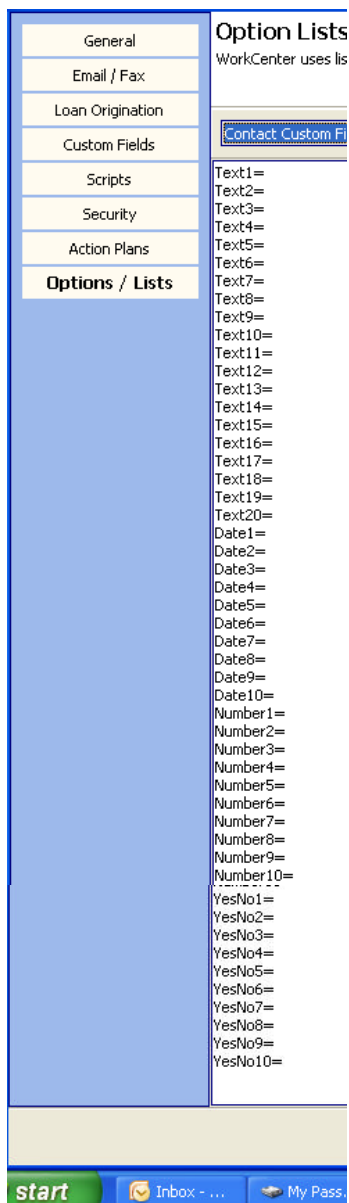
10 Date Fields

10 Number Fields

10 Yes/No Fields for your contact and loan custom fields

These fields are located in the same location as previous versions of WorkCenter. Click on Tools, Setup Options, Options/Lists button and then click the down arrow to find both the contact and loan custom fields.

Screen view shows only “Contact Custom Fields”. Renaming of the custom fields has not changed.



Contact Spouse First Name and Last Name:

In WorkCenter 5.0 we now have a first and a last name field for the contact spouse. This will allow users of WorkCenter to send emails and letters addressed to the “Spouse First Name”. To find the new fields, open a contact record, click on the “Info Tab” and then the “Spouse Tab”.

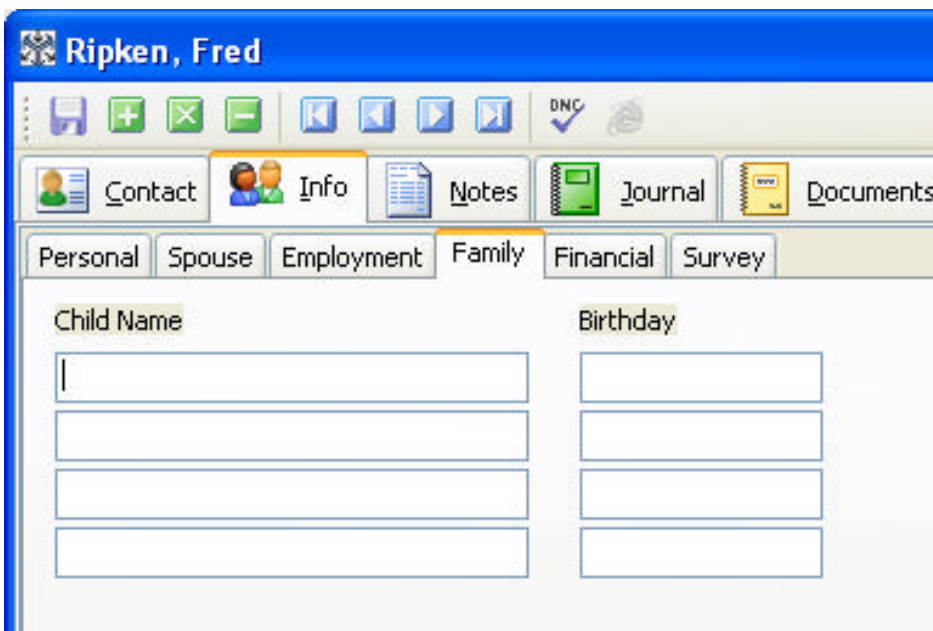


The screenshot shows the 'Ripken, Fred' contact record in WorkCenter 5.0. The 'Info' tab is selected, and the 'Spouse' sub-tab is active. The form displays the following fields:

First Name:	Tammy
Last Name:	Ripken
E-mail:	tr@msn.com

Children Names and Birthdays:

WorkCenter 5.0 now has 8 new database fields allowing the user to add 4 children and their appropriate birthdays. These fields are also displayed in the reports allowing for database mining of these dates. You can find the children names and birthday fields under the “Family” tab when you open a contact record. Select your contact record and enter the appropriate name and birthdays in the boxes displayed below.

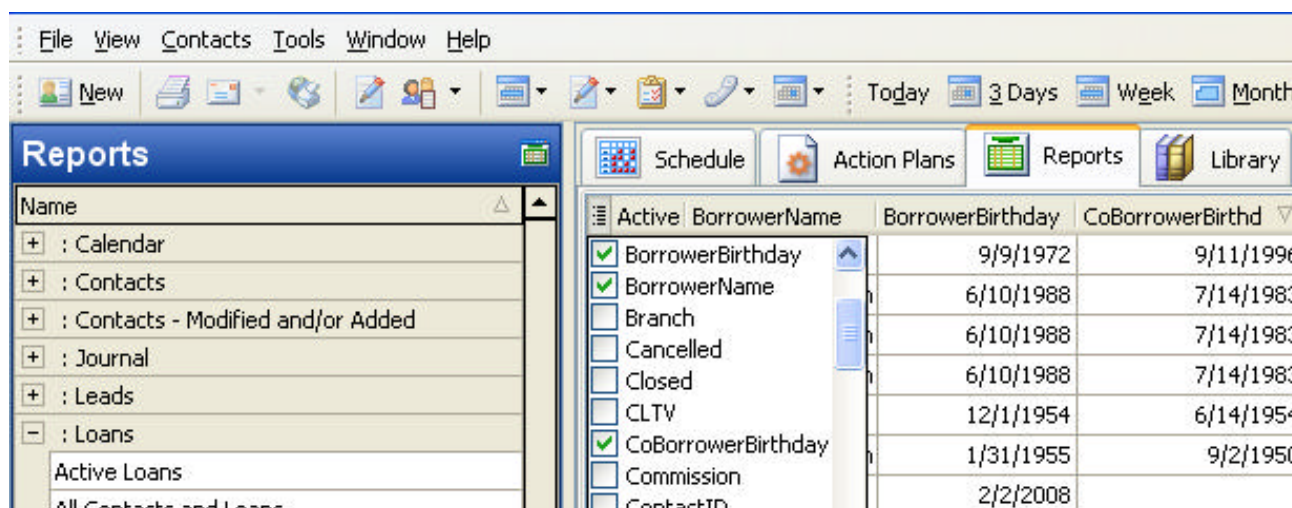


The screenshot shows the 'Ripken, Fred' contact record in WorkCenter 5.0. The 'Info' tab is selected, and the 'Family' sub-tab is active. The form displays the following fields:

Child Name	Birthday

Borrower and CoBorrower Birthday Fields:

We have now added fields in our loan records to display Borrower and Co-Borrower birthdays in our loan reports as shown below.



Active	BorrowerName	BorrowerBirthday	CoBorrowerBirthd
☒	BorrowerBirthday	9/9/1972	9/11/1996
☒	BorrowerName	6/10/1988	7/14/1983
☐	Branch	6/10/1988	7/14/1983
☐	Cancelled	6/10/1988	7/14/1983
☐	Closed	6/10/1988	7/14/1983
☐	CLTV	12/1/1954	6/14/1954
☒	CoBorrowerBirthday	1/31/1955	9/2/1950
☐	Commission	2/2/2008	
☐	ContactID		

These birthday fields are linked directly to the contact records or when you sync loan information into WorkCenter. Since the field is linked automatically, the WorkCenter user will need to enter the birthdays in the spouse and contact records and not through the loan reports.

Enhanced Calyx Point vSync Script:

Based on many requests from WorkCenter users across the country, we have enhanced the syncing script for Calyx Point Users. When you sync Calyx Point files into WorkCenter, we will now sync the additional fields into the database:

Calyx Point Field ID# 19 Loan Officer into WorkCenter “Contact Owner Field”

Calyx Point Field ID# 3220 Referral Source into WorkCenter “Referred By Field”

Calyx Point Field ID# 118 Borrower Birthday into the “WorkCenter Contact Birthday Field”

Calyx Point Field ID# 168 Co-Borrower Birthday into the “WorkCenter Spouse Birthday Field”

Calyx Point Field ID# 11906 Child #1 Name into the “WorkCenter Child1 Field”

Calyx Point Field ID# 11911 Child #2 Name into the “WorkCenter Child2 Field”

Calyx Point Field ID# 11916 Child #3 Name into the “WorkCenter Child3 Field”

Calyx Point Field ID# 11921 Child #4 Name into the “WorkCenter Child4 Field”

Calyx Point Field ID# 11907 ChildBirthday1 into the “WorkCenter ChildBirthday1 Field”

Calyx Point Field ID# 11912 ChildBirthday1 into the “WorkCenter ChildBirthday2 Field”

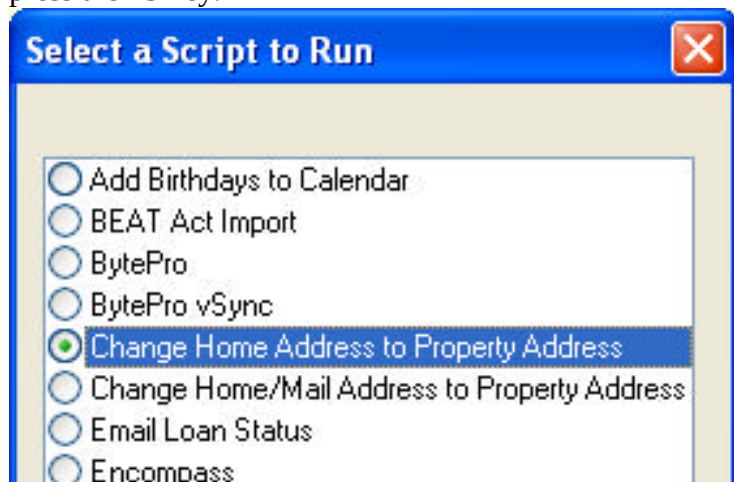
Calyx Point Field ID# 11917 ChildBirthday1 into the “WorkCenter ChildBirthday3 Field”

Calyx Point Field ID# 11922 ChildBirthday1 into the “WorkCenter ChildBirthday4 Field”

New Script for Changing the Property Address to the Home Address only (for borrowers with a separate mailing address):

Many of our WorkCenter users have clients that purchase new homes but keep a mailing address such as a P.O. Box. In this case, when the borrower purchases, closes and moves to a new home, this new script will allow the WorkCenter user to change the home address only and not the mailing address.

This script is called “Change Home Address to Property Address Script”. You will find this script when you press the F9 key.



New Action Plans Added:

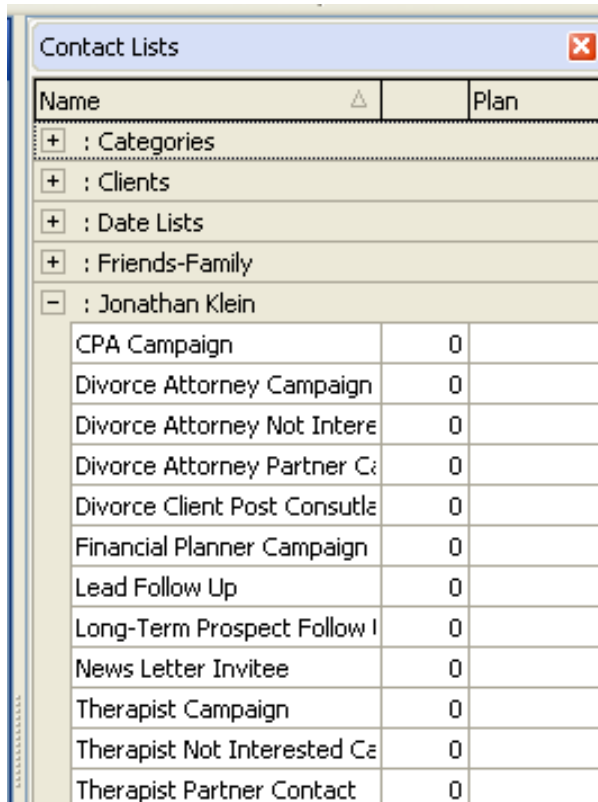
The 5.0 version now has additional action plans and appropriate documents to support all phases of the loan status reporting. We have added action plans which have new library documents attached to these automated campaigns. You can now see we have 11 loan status plans standard inside WorkCenter starting with “Loan Status – Purchasers”:

Schedule		
Action Plans		
Reports		
Library		
Web Center		
Processing		
Management		
Active	Name	Description
☐	Anniversary	Anniversary
☐	Broker Open House	Realtor Attendees
☐	Contact Birthday	Contact Birthday
☐	Contact Birthday - Print	Contact Birthday Print
☐	Contact Birthday Spouse	Spouse Birthday
☐	FSBO	Phone and Letter Follow up - Personal conversation
☐	Internet Leads - Refinances	Refinance
☐	Loan Process - Purchasers	Purchasers
☐	Loan Process - Refinance	Refinance
☐	Loan Status - Appraisal Received	Appraisal Has Been Received
☐	Loan Status - Approved	Loan Has Been Approved
☐	Loan Status - Cleared to close	Loan Has Been Cleared to Close
☐	Loan Status - Closed	Loan Has Been Closed
☐	Loan Status - Documents Ordered	Loan Documents Ordered
☐	Loan Status - Funding	Loan Has Funded
☐	Loan Status - Opened	Loan Has Opened
☐	Loan Status - Recorded	Loan Has Been Recorded
☐	Loan Status - Submitted	Loan Has Been Submitted

Jonathan Klein Contact Lists Added:

WorkCenter 5.0 has the ability to run the Jonathan Klein Divorce Attorney, CPA and Financial Planning Letters and Action Plans as an add-on feature. Jonathan Klein is an industry expert and is the Founder and President of the “Certified Divorce Planning Professional Institute” and is an alliance partner with vForms.

For those WorkCenter users who wish to purchase the additional letters and action plans, the 5.0 version of WorkCenter already has the group and lists to accommodate these action plans. You can find them located under the “Contact List Manager Lists” under the heading “Jonathan Klein”.



Name	Plan
+ : Categories	
+ : Clients	
+ : Date Lists	
+ : Friends-Family	
- : Jonathan Klein	
CPA Campaign	0
Divorce Attorney Campaign	0
Divorce Attorney Not Intere	0
Divorce Attorney Partner C	0
Divorce Client Post Consult	0
Financial Planner Campaign	0
Lead Follow Up	0
Long-Term Prospect Follow I	0
News Letter Invitee	0
Therapist Campaign	0
Therapist Not Interested C	0
Therapist Partner Contact	0

Sue Woodard – Jonathan Klein Library Tabs:

Sue Woodard and Jonathan Klein are both major alliance partners of vForms. We offer as an add-on four libraries with pre-designed action plans:

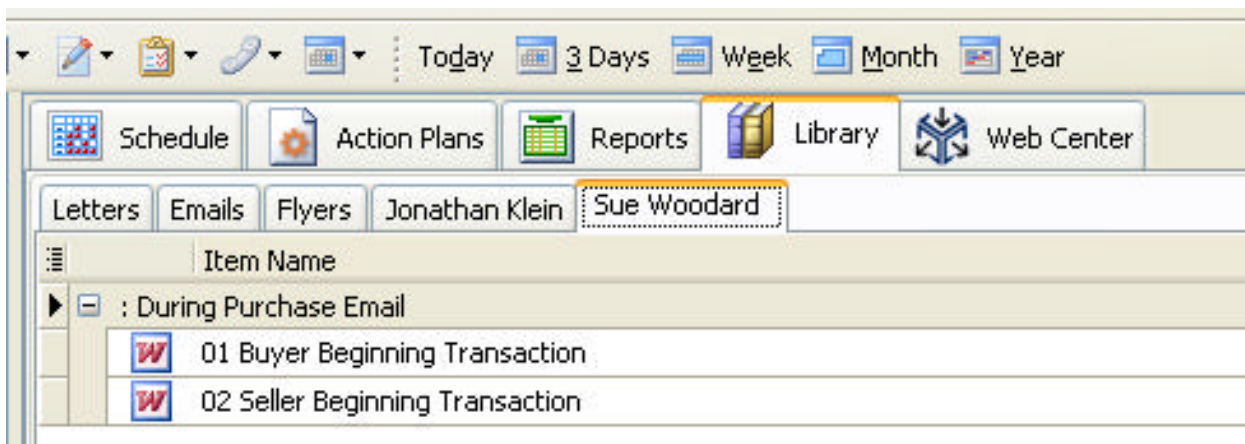
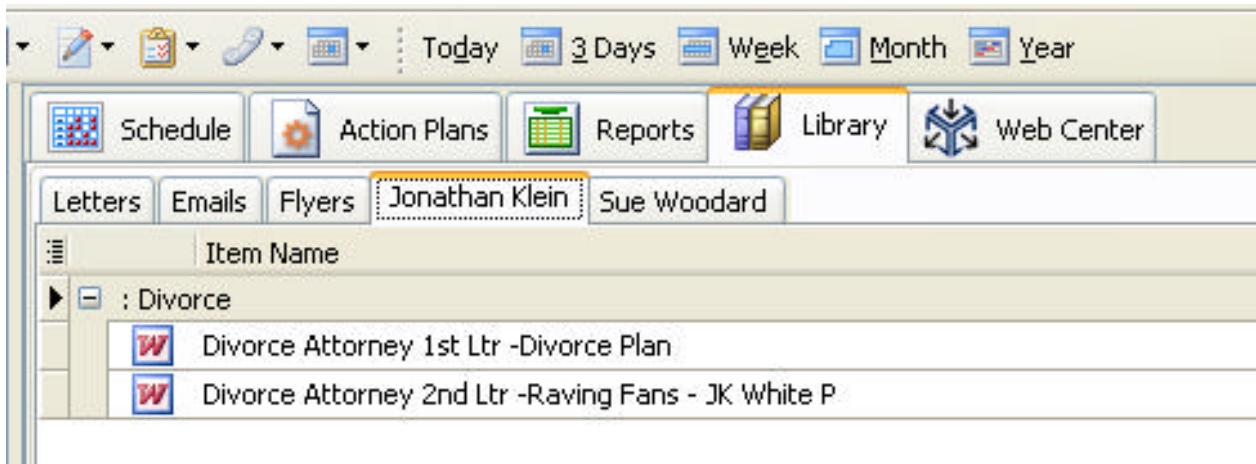
Sue Woodard – English Marketing

Sue Woodard – Spanish Marketing

Jonathan Klein – Divorce Attorney Marketing

Jonathan Klein – CPA/Financial Planning

When you download your 5.0 WorkCenter and Database, under the Library Tab you will see two additional tabs. One is marked Jonathan Klein and the other Sue Woodard. When you open these tabs, you will notice two sample letters for each library. This will familiarize you with the add-on modules. Please contact your national business development officer at vForms toll free 877.498.6888 for more information and pricing options for these additional marketing solutions.



User manuals can be found on our website www.vForms.com under the Training/Support tab for using both the Jonathan Klein and Sue Woodard Libraries and Action Plans.

Microsoft Vista Operating System:

As we all know, Microsoft has launched its Vista Operating System. There are many additional security features incorporated inside the Vista Operating System. If you are a present Vista user, you are aware of the issues that Microsoft is consistently addressing. We also expect several major additional enhancements to be released by Microsoft within the Vista Operating System.

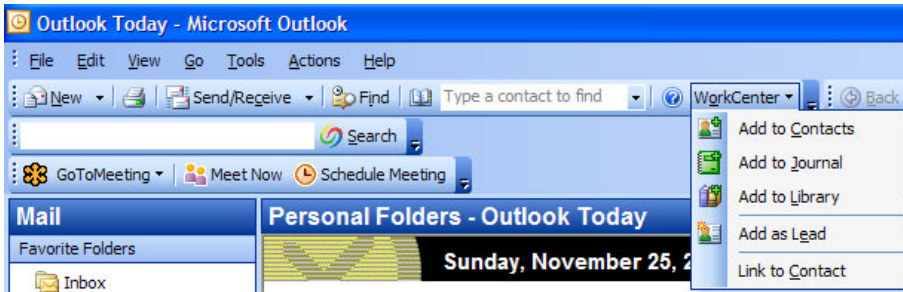
WorkCenter 5.0 now operates with Vista Operating Systems. WorkCenter will now operate very efficiently on a computer to computer basis with the Vista Operating System. If you are sharing a database, you know can have Vista and Microsoft XP operating systems sharing the same database. As Microsoft continues to enhance and improve their Vista Operating System, WorkCenter will keep pace with their improvements in the 5.0 versions of WorkCenter CRM.

Microsoft Vista Office 2007 Compatible:

Microsoft has released updates to their Vista Office 2007 programs. This is a major enhancement by Microsoft from their previous Office 2003 software. We expect Microsoft to continue improving the 2007 software and also evaluate the file format they have chosen for their 2007 Word and Excel programs. See the notes below about the Microsoft Word and Excel 2007 integration with WorkCenter.

Vista Office 2007 Outlook:

WorkCenter 5.0 is completely compatible with Vista 2007 Outlook. WorkCenter continues to support only Microsoft Outlook in emailing your documents or interfacing with your Action Plans. You now have the ability to add contacts, journal items, pictures/documents, and leads, and link incoming emails to WorkCenter contacts in the 5.0 version of WorkCenter. We also expect Microsoft to make some additional revisions to the Vista 2007 Outlook program.



Contact and Calendar Office Vista 2007 Integration:

WorkCenter has enhanced data and calendar integration with the Vista 2007 Outlook. Major software code creation was needed inside WorkCenter in order to operate with the new Vista 2007 Outlook. WorkCenter comes standard with one way calendar and contact synchronization from Outlook into WorkCenter 5.0. WorkCenter users have the ability to acquire an add-on data synchronization module that will allow PDA users the ability to transfer WorkCenter data and calendar items back to the Vista Outlook 2007 program. This will allow all PDA users to then sync their Outlook data to their PDA device.

Vista Office 2007 Word and Excel:

We at vForms expect Microsoft to continue to modify their new Word 2007 and Excel 2007 file formats. If you are a Vista Office 2007 user, you have come to realize that Microsoft has added an “x” to the end of their file formats for Word and Excel. The Word file extensions are now named with a “.DocX” and the Excel file extensions are changed from the “xls” to a “XLSX” extension format. We at vForms have decided to wait a short time to see if there is any major revision by Microsoft on this file format of their Word and Excel files. At this time we do not expect Microsoft to change. We will be releasing a small revision of our 5.0 version in the near future that will be compatible with these formats in our import wizard for Excel and being able to drag and drop your 2007 Word files into our library.

While importing a Word Document or Excel Spreadsheet into our WorkCenter library, please save the document using the “97-2003” format. To accomplish this, click on “SaveAs” and then select the “97-2003” option.

Importing Vista Office 2007 Excel Spreadsheets into WorkCenter 5.0:

WorkCenter 5.0 will import both the 2003 and 2007 file data using our import wizard. It is not necessary to change your Excel 2007 spreadsheet into a “97-2003” format.

WorkCenterPro Introduced:

The 5.0 version of WorkCenter now has the option for a monthly subscription to WorkCenter special version called WorkCenterPro. This is a copy of WorkCenter including marketing newsletters from OriginationPro and Dave Hershman. This monthly subscription program includes the following in the special package:

The WorkCenterPro *Exclusive* Monthly Subscription For a low monthly fee you get—

Industry leading **WorkCenter CRM Software** from vForms

All future upgrades and technical support included as long as subscription is current

Access to WorkCenter CRM live Webinars

Access to Dave Hershman training/coaching sales and finance Webinars

Subscription to the "**NewsLetterPro Marketing System**" written by Dave Hershman

Weekly HTML professional newsletters include your picture and personal info

Ability to email these customized newsletters using WorkCenter CRM

Four page print newsletter that you can mail monthly

Monthly sales article for your Realtors and other B-to-B sources

One page newsletter you can fax monthly

Monthly real estate article for prospect conversion

Bonus marketing flyers and marketing letters

All documents but the HTML emails are provided as Microsoft Publisher Docs or as a PDF, both of which can be personalized.

***NOTE: Existing WorkCenter CRM users -
call vForms for special pricing of the "NewsLetterPro" add-on to WorkCenter
Call Sales toll free for pricing options: 877.498.6888***

Additional User Guides & Webinar training sessions offered for 5.0 users:

vForms has released a new WorkCenter 5.0 user guide. We have also added this guide to our website at www.vForms.com under the Training/Support tab along with a short guide covering "Using WorkCenter with Vista and Vista Office 2007" manual. We have also updated our "Getting Started Guides" and other user manuals.

WorkCenter Webinar Options: vForms is offering personalized WorkCenter Webinar training sessions through our Client Services Division. These Webinars are priced at a reasonable cost to WorkCenter users. We at vForms realize that our mortgage and financial professionals who use WorkCenter can benefit from personalized training or coaching. We also realize these professionals have come to use our Webinars to expedite their knowledge and use of WorkCenter while concentrating on what they do best...closing more loans and making more money.

